

SimNet - Enterprise

Integrated Idea Management

General Software Specification

Version 8.1



*Celebrating 20 Years
of Innovation*

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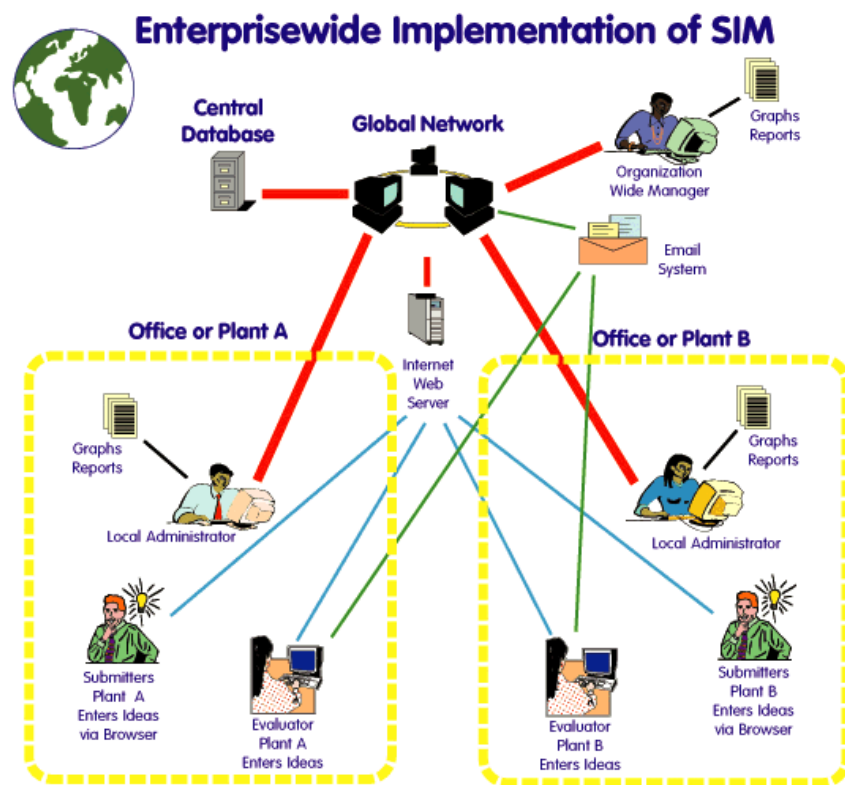


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SIMNET 8 ENTERPRISE SOFTWARE DOCUMENTATION

- **SimNet 8 User Manual** – Reviews our new fully web enabled enterprise version of SIM, using client/server databases and designed to manage multiple employee involvement processes (ideas, teaming, corrective actions...) in a central database with multiple facilities sharing that database. (Version 8.1 - 140 pages)
- **SimNet 8 System Administrator Manual** – Discusses administration of key SimNet functions for users trained as SimNet System Administrators. (Version 8.1 - 128 pages)
- **SimNet 8 Software Mind-map** – This diagram in the format of a mind-map identifies key features in a single page layout.
- **Sample Diagram of SimNet Implementation** – Displays how an organization could implement different idea systems, team activities or recognition programs with SimNet.
- **SimNet Software Specification Version 8.1** – This document, it describes key features and technical specifications of the SimNet 8.x series software.



The **SIM-Integrated Idea Management** system is a powerful approach to managing innovation, ideas, recognition, team projects and other improvement efforts in your organization. This specification covers key features and technical elements of the enterprise-based **SimNet** software tool. It runs on your organization's intranet or the internet (worldwide web).

- **SimNet 8** was designed for on-line access by a wide range of personnel. This includes: supervisors, managers, submitters, team members, team leaders, evaluators, quality engineers/staff, implementers and facilitators.
- Key power users will also use this interface to do their work (e.g., administrators & coordinators). It supports additional features for the tasks they need to perform.
- **SimNet** has a flexible interface that can be geared to your specific organization. Using our unique process concept, **SimNet** can support a wide-array of innovation and improvement systems throughout your organization. Each process can have different administration or management that owns that data.
- **SimNet Automation** further supports control of how entries are handled and displayed.

GENERAL SPECIFICATIONS – SIMNET – ENTERPRISE – 8.1

KEY FEATURES

<p>Overview</p>	<ul style="list-style-type: none"> • Manages Ideas and/or Recognition – Multiple programs can be managed in the same database – each with its own look and feel. <ul style="list-style-type: none"> ○ Innovation (e.g., new product) ○ Ideas can be improvement ideas, traditional suggestion activities, or continuous improvement. ○ Team projects (e.g., Six Sigma or corrective actions) ○ Structured collaboration ○ Safety programs ○ Peer-based recognition awards – sometimes call spot awards. • Supports a Wide Range of Participants – You decide who can participate: <ul style="list-style-type: none"> ○ Employees ○ Contractors ○ Customers ○ Suppliers • Simple-To-Use – Basic end users such as submitters have simpler entry forms and pages than advanced users of the system (e.g., an administrator). • Output Information <ul style="list-style-type: none"> ○ Printed letters or email to participants ○ Standard reports ○ Custom reports ○ Data export • Enterprise Solution <ul style="list-style-type: none"> ○ Multi-lingual – Virtually any language can be supported. Shifts from left-right to right-left for those languages requiring it (e.g., Arabic). ○ Multi-currency – Each site can have its local currency yet you can report organization-wide reports on the master currency (e.g., for a U.S. corporation, a plant in Mexico could report locally in Pesos but for global organizational reports, the same information could be reported in dollars). ○ Multi-site – Each site can have its own personalized version of an idea system or recognition program. ○ Localized Ownership – Administration of an idea system or recognition program can be controlled by area so an administrator at one facility can only manage ideas from their facility. ○ Security – Based on overall defined user levels as well as for each specific idea or recognition item. ○ Client/Server Database – Microsoft SQL Server. <p><i>The best way for us to show you now SimNet works is to schedule a personal demo. This allows our staff to tailor the demo to how you manage ideas and/or recognition..</i></p>
<p>Idea Tracking</p>	<p>8.0</p> <ul style="list-style-type: none"> • Multiple Processes (idea formats) can be defined – allowing for parallel programs. <ul style="list-style-type: none"> ○ Each process can have different ownership, participants and setup. ○ Each process can have a completely different entry form – including keywords, paragraphs and awards/recognition. ○ For instance one process (for North American suggestions) may have completely different text information and key status dates than another process (for North American corrective actions) as well as currency type. Each of those two processes may have a different person managing each program as well. • Automatic Idea Numbering – For each process, a unique idea numbering scheme can be defined. • Text Information – Unlimited paragraph sections can be set up for a specific idea type. <ul style="list-style-type: none"> ○ Plain text ○ Rich text – includes spell checking and enhanced editing capabilities ○ Boxes can be of variable size • Keywords – Categorize ideas by keyword lists such as process or strategic initiatives.

	<ul style="list-style-type: none"> ○ Multiple keyword categories can be identified and keyword lists can be tailored to different areas in your organization (e.g., one facility may have different keywords they use versus another site). ● Campaigns for Ideas – SimNet supports multiple and even concurrent campaign activities. ● Organizational Structure – Using groups and organization categories SimNet can support a broad range of organizational structures. This also controls SimNet functionality as many SimNet features can be tied to a specific Organization/Group structure and only ideas that relate to that group will display that feature. <ul style="list-style-type: none"> ○ Primary Group and Organization – This is the key group a person is a member of and is used for organizational reporting. Normally the primary group is the cost center or department that person works in. It also determines which Processes people can submit ideas for. ○ Teams – The group feature can also be used to support membership on work teams. A person can be an active member of multiple teams. ○ HR Import – Normally the primary group data is imported at the same time as the HR data about participants of the system. ● History – A unique feature that manages all activity for an idea. The history section simplifies reviewing status and activity on an idea. It allows for a high degree of flexibility in tailoring SimNet to the customer’s process using set up pages. This avoids costly custom programming and the ability to adapt the software to current and future needs. <ul style="list-style-type: none"> ○ Dates – Stores all key status dates (date received, date decision, date implemented). Use defines what status dates to use in the software. ○ Routing - Responsibility tracking (e.g., evaluators, supervisors). Routing is managed by a task or role that clearly identifies why that person is assigned to review that idea. These tasks or roles are user-defined. ○ Notes – Multiple notes types are supported to track idea resolution, general comments and other needs. ○ Benefits – Savings and/or cost worksheets that are customer defined. Can be linked to awards for standard award calculations and custom calculations can be linked to awards as well. Microsoft Excel based forms can be used to enter benefits information – this lets the user have a higher level of control over how these forms are designed. ○ Awards – See next section for further description. ● Tasks – A feature that combines a person’s open History assignments along with other tasks they must complete. The Task list allows people to view in one area all items they must finish – whether it is idea review, assigning a new person or finishing up an idea. ● Submitters - Multiple sources of participants (employees, contractors, customers, suppliers supported) ● Several Idea Entry Methods <ul style="list-style-type: none"> ○ Step-by-step for first time users ○ Single form method for advanced users. Help information can be imbedded on entry pages. ○ Links on a Portal Page can go directly to the Step-by-step idea entry form. ○ Custom web form solutions can be created that are imbedded directly on one of your Portal Pages (call for a quotation to create a custom web form). ● SimNet Automation – reduces repetitive tasks and controls actions taken by the software.
<p style="text-align: center;">Awards & Recognition Tracking</p>	<p>8.0</p> <ul style="list-style-type: none"> ● Uses History feature above to manage idea awards and/or recognition. ● Handles cash, points, milestone points, merchandise, recognition items and other award/recognition activities (e.g., recognition celebration events). ● Includes a link to ideas, if the award was directly related to an idea (e.g., suggestion award) ● Supports ability to give awards or recognition to all participants of an idea; not just submitters. <p>8.1</p> <ul style="list-style-type: none"> ● Supports multiple non-idea award programs (e.g., safety, anniversary awards and peer awards) ● Raffle based method to select winners of ideas or award/recognition programs ● Awards can be automatically calculated via benefit calculations (savings/cost worksheets) <p>9.0</p> <ul style="list-style-type: none"> ● Nominators for peer based processes



GENERAL SPECIFICATIONS – SIMNET – ENTERPRISE – 8.1

<p>Correspondence to Participants – SimNet Letters</p> <p>Mail Merge Feature</p>	<p>8.0</p> <ul style="list-style-type: none"> • SimNet uses a mail merge type process via a HTML template to create output letters to participants (submitters, evaluators...). • Basic merge codes are provided and can be inserted into the template. This includes the idea number, submitter name(s), letter recipient, and other idea information. • This letter capability could also be used to create a form related to the idea or recognition activity (e.g., appeal form). • Letters can be a composite of several elements (header, body and footer) so items such as headers can be generic to many letters. • Supported output formats are: <ul style="list-style-type: none"> ○ E-Mail – SMTP. ○ Letters – Printed <p>8.1</p> <ul style="list-style-type: none"> • Capability added to process letters for a database view to process printed letters or emails to a group of people (e.g., outstanding idea reviews that are overdue). <p>8.2</p> <ul style="list-style-type: none"> • Enhanced merge code feature with user-defined merge codes supported. Note: some custom merge codes may require billable TQS involvement. <p>8.3</p> <ul style="list-style-type: none"> • Output to other devices such as SMS (text messaging) • Letters – via Microsoft Word.
<p>Portal Page</p>	<p>SimNet supports working with a Portal Page as a front end that promotes the idea system or team projects being managed.</p> <p>8.1</p> <ul style="list-style-type: none"> • Imbed link to automatically go to the idea entry form for the current user (if single sign-on is active). • Other links will bring up a list of the person’s submitted ideas or tasks. • Ideas listed on the Portal can include links that will use SimNet’s Letter feature to bring up a copy of the idea in more detail. • Custom web form solution for idea entry (call for a quotation to create a custom web form directly in your Portal Page). • Integrate Portal Page HTML header directly into SimNet. • TQS Software can provide a generic Portal Page that can be tailored to fit your needs. You can also create your own Portal Page design and work with TQS Software staff to create the appropriate links. <p>8.2</p> <ul style="list-style-type: none"> • Integrating lists of top ideas or the user’s ideas into the Portal that can be displayed on-the-fly.
<p>Reports and Graphs</p>	<p>SimNet is designed as an enterprise solution. Reporting needs, in this scenario, will vary from customer to customer. SimNet comes with several basic reports with the concept that key organizational reports will be custom tailored for that specific customer. Each report is driven by a user-defined view and other setup information – providing a high degree of flexibility in how that report can be used. So most customers will only require a handful of reports to provide a wide range of information using different views with those same reports.</p> <p>SIM supports several key standard reports via a flexible interface that allows for ad-hoc selection of data via views of the data. These reports are:</p> <ul style="list-style-type: none"> • 8.0 <ul style="list-style-type: none"> ○ Idea listing ○ Audit listing ○ Basic statistics ○ Assignments – from history routing we can display assigned evaluators and other people reviewing an idea. • 8.1 <ul style="list-style-type: none"> ○ Award Listing – if your organization has a specific method of reporting awards to payroll, this report could be customized to fit your requirements.

	<ul style="list-style-type: none"> ○ Enhanced statistics broken down by organization, group and time period. ○ Statistics by person – either as a submitter or person reviewing ideas/projects. ○ Raffle or random drawing– for a specific permanently defined query, the raffle results (people selected) and the overall population count it was selected from can be reported. ○ Switched from using Crystal Reports for standard reporting to internal reporting tool. If a customer wants SimNet to use Crystal Reports for standard reporting rather than the new internal reporting tool, that feature can be included for an extra fee. ● 8.2 <ul style="list-style-type: none"> ○ Management Status statistics grid-based report ○ Participation list – this can be linked to the raffle feature above. ● SimNet uses a built-in reporting tool to create report templates. TQS support staff can work with customers to create the reports that exactly fit customer requirements, using the SimNet built in reporting tool. <ul style="list-style-type: none"> ○ Creation of custom report/graphs by TQS staff may not be included in the standard installation package. The customer needs to provide their installation reporting needs to confirm what will be included in the standard package. ○ Total Quality Systems Software does not provide a report writer for creation of reports by end-users in the standard installation. ○ Customers, with training, can also create their own report/graph outputs using an off-the-shelf report writer (e.g., Crystal or COGNOS).
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GENERAL SPECIFICATIONS – SIMNET – ENTERPRISE – 8.1

TECHNICAL INFORMATION	
General Technical Notes	<p>8.0</p> <ul style="list-style-type: none"> • N-tier architecture – initially 3 tiers with: user interface (front end), business objects, and database (back end) • Object oriented • 32 bit architecture • Normalized database • Key development platform is Microsoft .NET (C#) with ASP.Net browser based solution. • View or query driven – users will work off of a view of the data, or a query result, rather than the entire database for key tables (ideas, awards and people). Queries will use the security level of the user to determine what information is available as well as what user group/ area they are in. <p>9.0+</p> <ul style="list-style-type: none"> • 64 bit architecture
User Interface	<p>8.0</p> <ul style="list-style-type: none"> • Browser based interface for: submitters, evaluators, coordinators, managers and administrators • System setup and installation will be handled by TQS support staff. • Reporting will include a basic reporting set. TQS staff will create custom user specific reports as needed or the customer can also use Crystal Reports to create their own reports (training course on how the SIM database functions is required). • Users are either authenticated automatically or must log-in using an id and. The former requires that the network user id of the user can be linked to SIM personnel. <p>Future</p> <ul style="list-style-type: none"> • Other front ends could be created in a wide range of environments and other development platforms. This could include: Windows, Lotus Notes, PDA, and telephony.
SIM-Net Browser Workstation Requirements	<p>8.0</p> <ul style="list-style-type: none"> • Microsoft IE (5.0 or newer) <p>Future</p> <ul style="list-style-type: none"> • Other browsers
Business Objects	<p>8.0</p> <ul style="list-style-type: none"> • All business rules will reside in the business object except for the most basic of data verification that will reside with the database.
Databases	<p>8.0</p> <ul style="list-style-type: none"> • Hardware or database backend licenses are not included in SIM 8.0 installations – if TQS is required to provide them, we will provide a quote for those items. • For client/server databases, licenses are not included in any standard pricing. • Microsoft SQL 2000 or newer.
Attachments	<p>8.0</p> <ul style="list-style-type: none"> • Controls the maximum size and types of attachments supported for a customer • SIM supports other information to be attached to a specific idea including: <ul style="list-style-type: none"> ○ Word ○ Excel ○ Access ○ PowerPoint ○ BMP ○ GIF ○ TIF ○ JPEG ○ Others
Queries/Views	<p>8.0</p> <ul style="list-style-type: none"> • User defined and stored. Comprehensive set up pages allow for a wide range of views to be created. • Defined standard views are displayed in a handy tree-type structure similar to what is used in Microsoft Outlook.

	<ul style="list-style-type: none"> By user type the list of standard views can be selected from the tree-type structure or a drop down list (the tree-type structure is ideally suited for advanced users of the system). Views are used to view/update directly a set of entries or to create reports. <p>8.2</p> <ul style="list-style-type: none"> Driven to two basic output formats (see below). <p>9.0</p> <ul style="list-style-type: none"> Driven to additional output formats (see below). History of when a query was run will be stored (if a permanent defined query).
Data Export	<p>8.0</p> <ul style="list-style-type: none"> Adobe PDF – report output only <p>8.1</p> <ul style="list-style-type: none"> Microsoft Excel HTML XML <p>8.2</p> <ul style="list-style-type: none"> Text (ASCII) – tab or comma delimited (CSV)
Data Import	<ul style="list-style-type: none"> HR data or other data needs to be imported to keep the SimNet organizational data current. Normally this is via a customer provided Excel or CSV file that is updated daily, weekly or monthly – preferred over direct database access for security reasons. This process is a custom solution for each customer – customer needs must be reviewed prior to installation. It is crucial that a solid understanding of the organizational structure be defined prior to setting up the import of people into SimNet. Idea import – Ideas can be imported into SimNet via a standardized Excel spreadsheet form. Other custom approaches can be created as well. Initial Installation Import – Ideas from any existing idea system need to be installed in SimNet during the installation process. This normally is a one time import and requires access to by TQS Software support staff to the data.
Tailoring SimNet for a Specific Customer	<p>8.0</p> <ul style="list-style-type: none"> SimNet contains an administration section that supports updating and creating new processes as well as how the system functions. Normally TQS Software personnel set up the initial system for a customer with the required processes. TQS Software staff can also train appropriate customer users on how to manage this information – this is a multi-day course covered in several sections over a period of 2-3 months. Customization of the software will be supported and linked seamlessly into the main software modules. Below are the key areas we feel will need to be supported for specific customers by quotation: <ul style="list-style-type: none"> People import – employees, contractors and other participants need to be populated from existing HR and other databases. Reporting Cost calculation screens or review forms – these are based on Excel spreadsheet templates that the user can create with TQS Software support. Automatic award handling Linkages to payroll Special award programs Campaigns, idea events, and special tracking Custom entry sections
Web Server	<p>8.0</p> <ul style="list-style-type: none"> Microsoft IIS v6.0 (Internet Information Server) <ul style="list-style-type: none"> Minimum 1 GB Ram, One or more processors running at 2.8 Ghz or more. (Note this is a minimum hardware specification, medium to large companies will require multiple servers.) 80 - 160 GB hard-drive (3 GB per 100,000 suggestions not including attachments.) .NET Framework 2.0 Requires access to the data which may reside on the web server or a separate data server.



GENERAL SPECIFICATIONS – SIMNET – ENTERPRISE – 8.1

<p>Users</p>	<p>8.0</p> <ul style="list-style-type: none"> • Key users are identified in a user table when they log into SimNet. This is for high-level users such as administrators and coordinators – defining a security role level that lets them manage the overall process. Each process can have different key users so people can independently manage different processes. • Other log-in user types are managed via generic user security roles (e.g., submitters, evaluators). • Each idea or recognition item further defines user access based on if the logged in user is a submitter, has a task (e.g., evaluator), or is the award recipient. • Profiles and settings can be established by process for each organization, key user or generic user group. <p>8.1</p> <ul style="list-style-type: none"> • Profiles can include language defaults or preferences.
<p>Support</p>	<ul style="list-style-type: none"> • The standard support package provides support via telephone, email, or web-meetings. On-site support, training, consulting or extensive customization are available via other support packages or for an extra cost. • Total Quality Systems Software uses the GoToMeeting (Citrix-based) web meeting tool for meetings. However, many corporations specifically only support certain meeting tools and may not support GoToMeeting. If GoToMeeting cannot be used, it is necessary for the customer to provide their own meeting tool for support staff to work with key users of SimNet. • Updates to the SimNet system may require direct access to the web server and/or database backend. Usually a web-based meeting tool will suffice but it may be necessary to provide limited access by support staff. This will limit the needs for on-site support. • Total Quality Systems software will also host SimNet 8.x on one of their web servers for access via the internet.
<p>Foreign Languages</p>	<p>8.0</p> <ul style="list-style-type: none"> • SIM will support multiple foreign languages via a language Culture Information selection list – this list is based on country/region as well as language. • Customers will be able to create or edit language translations • Language feature could also be used for variations in verbiage between different sites (e.g., US and Canadian terminology differences) • Identifies the date type by the user's language. <p>8.1</p> <ul style="list-style-type: none"> • Automatic language translation of idea text to another language. Shipped set up to use Google's translation service (currently free) but can be linked to use other translations services specified by the customer (contact TQS Software for a quote to use other services). <p>8.2</p> <ul style="list-style-type: none"> • Advanced language features.
<p>Security</p>	<p>8.0</p> <ul style="list-style-type: none"> • User log-in page that is authenticated via SimNet internal table. User roles determine access to the overall system as well as access to a specific idea based on ownership for that idea (administrator, idea review, or submitter). <p>8.2</p> <ul style="list-style-type: none"> • Direct network authentication – skipping log-in screen. Windows Active Directory or LDAP authentication of users.